



AGENDA REQUEST FORM

THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA

ITEM No.:

EE-36.

MEETING DATE

2018-06-12 10:05 - School Board Operational Meeting

AGENDA ITEM

ITEMS

CATEGORY

EE. OFFICE OF STRATEGY & OPERATIONS

DEPARTMENT

Procurement & Warehousing Services

Special Order Request

☐ Yes

☒ No

Time

Open Agenda

☒ Yes

☐ No

TITLE:

Recommendation of \$500,000 or Less - 19-008V - Investment Banking Services

REQUESTED ACTION:

Approve the recommendation to award the above Request for Proposals (RFP): Contract term: August 1, 2018 through July 31, 2023, 5 Years: User Department: Treasurer's Office; Award Amount: N/A; Awarded Vendor(s): Citigroup Global Markets, Inc.; J.P. Morgan Securities, LLC; Merrill Lynch, Pierce, Fenner & Smith, Inc.; Morgan Stanley & Co., LLC; PNC Capital Markets, LLC; Wells Fargo Bank, N.A.; Small/Minority/Women Business Enterprise Vendor(s): None.

SUMMARY EXPLANATION AND BACKGROUND:

The School Board of Broward County, Florida (SBBC), received fourteen (14) proposals for RFP 19-008V - Investment Banking Services. The recommendation for award is to four (4) Senior Managers and two (2) Co-Managers. The services under this RFP will provide the District with services from investment banking firms for the issuance of long-term debt and tax-exempt lease-purchase obligation

A copy of the bid documents are available online at: http://www.broward.k12.fl.us/supply/agenda/19_008V_InvestmentBankingServices.pdf

These Agreements have been reviewed and approved as to form and legal content by the Office of the General Counsel.

These Agreements will be executed after School Board approval.

SCHOOL BOARD GOALS:



Goal 1: High Quality Instruction



Goal 2: Continuous Improvement



Goal 3: Effective Communication

FINANCIAL IMPACT:

There is no financial impact to the District.

EXHIBITS: (List)

(1) Executive Summary (2) Agreements - 6 (3) Recommendation Tabulation

BOARD ACTION:

(For Official School Board Records Office Only)

SOURCE OF ADDITIONAL INFORMATION:

Name: Ivan Perrone

Phone: 754-321-1980

Name: Mary C. Coker

Phone: 754-321-0501

THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA
Senior Leader & Title

Maurice L. Woods - Chief Strategy & Operations Officer

Signature

Electronic Signature

Form #4189 Revised 08/04/2017

RWR/ MLW/MCC/IP:mbw

Approved In Open
Board Meeting On: _____

By: _____

School Board Chair